

## PCard Notification #001 - PaymentNet Changes

Effective 3/21/2016, PaymentNet has changed. Upon first logging on, PaymentNet users will see:

### NAVIGATION: Streamlined Access to PaymentNet Modules

Additional navigation links are now provided on certain PaymentNet screens to streamline the process of locating and displaying account data in the various modules. This feature eliminates the need to select a module from the menu bar and then search for the account in order to view account-related data.

A user's ability to navigate to any module is based on the organization settings and the user's permissions and scope of view.

Using the new "Take me to" drop-down feature (see Figure 1 below), users are now able to quickly jump from the Account List or Account Detail screens to one of the following screens to see information related to a specific account: Account List, Account Detail – General Information, Authorizations/Declines List, Transaction List – Last 30 Days, Payment List – Activity, Statement Detail, and Employee Detail – General Information (provided an employee is associated with the account).

Figure 1 below, shows the new "Take me to" column drop-down in the Account List screen activated and the Account Detail – General Information was selected from the options listed.

Figure 1: Navigation Options on the Account List Screen

The screenshot shows the PaymentNet Account List screen. At the top is a navigation bar with tabs: Home, Transactions, Orders, Reports, Accounts, Employees, Payments, Administration, and Help. Below this is a search bar with 'Account List' and 'New Query' labels, a 'Look For...' dropdown, and 'Go' and 'Advanced Query' buttons. Below the search bar are 'Select All Pages' and 'Clear All Pages' buttons. The main table has a header row with columns: 'Take me to...', 'Account Number', 'Cardholder Last Name', 'Cardholder First Name', 'Account Status', 'Credit Limit', 'Current Balance', and 'Hierarchy ID'. The 'Take me to...' column has a dropdown menu open, showing options: 'Account Detail - General Information' (highlighted with a red box), 'Authorizations/Declines List', 'Employee Detail - General Information', 'Payment List - Activity', 'Statement Detail', and 'Transaction List - Last 30 Days'. The table contains several rows of account data.

Take me to...	Account Number	Cardholder Last Name	Cardholder First Name	Account Status	Credit Limit	Current Balance	Hierarchy ID
	1234567890123456	ACARDHOLDER	ANIL	ACTIVE	\$2,500.00	\$100.00	Hierarchy1
Account Detail - General Information		EMPLOYEE	BENJAMIN	ACTIVE	\$2,000.00	\$250.00	Hierarchy2
Authorizations/Declines List		HOLDER	CAROL	NEW	\$2,000.00	\$0.00	Hierarchy1
Employee Detail - General Information		HOLDER	DAMON	ACTIVE	\$2,500.00	\$150.00	Hierarchy1
Payment List - Activity		HOLDER	EDUARDO	ACTIVE	\$2,500.00	\$1,000.00	Hierarchy2
Statement Detail		HOLDER	FRANKLIN	PENDING	\$2,000.00	\$0.00	Hierarchy1
Transaction List - Last 30 Days		PAYCARDHOLDER					

After viewing the Account Detail – General Information screen(s), the user may quickly move to other information related to that account, such as a list of transactions that have been posted

to the account or a list of payments that have been made to the account. From the Account Detail - General Information screen, the user can select one of the options by clicking the “Take me to” button found in the upper right corner to activate the drop down list and select from the available options, as shown in Figure 2 below.

Figure 2: Navigation Options on the Account Detail Screen

Account Detail - General Information

General Information | Controls | MCC Group Controls | History

Save Create New Account

\* Required Fields

Account Number 1234567890123456 03/18

Current Balance \$100.00

Available Credit \$2,400.00

Hierarchy ID HIERARCHY1 HIERARCHY 1 DESC...

Status Active

Open Date 04/05/2010

Type of Account Individual

Reassign Account

User ID ABCD1234

Take me to...

- Account List
- Authorizations/Declines List
- Employee Detail - General Information
- Payment List - Activity
- Statement Detail
- Transaction List - Last 30 Days

The selected screen displays the information for the same account viewed previously in the Account Detail – General Information screen(s). Figure 3 below shows the Transaction List for the account. From the Transaction List screen, the user may make other selections from the “Take me to” button/drop down list to view other information related to the same account.

Figure 3: Transaction List

Transaction List New Query Look for... Go Advanced Query

Take me to...

- Account Detail - General Information
- Account List
- Authorizations/Declines List
- Employee Detail - General Information
- Payment List - Activity
- Statement Detail

Query results were limited to the most recent 30 days. Press Advanced Query and change the Date Range for results that are greater than 30 days.

Account Number 1234567890123456

(New Query)

	Parent Merchant Name	Transaction ID	Account Number	Transaction Amount	Divert
<input type="checkbox"/>	BIG STORE	111111111111111	1234567890123456	\$40.00	
<input type="checkbox"/>	LARGE STORE	111111111111100	1234567890123456	\$40.00	
<input type="checkbox"/>	SMALL STORE	111111111111050	1234567890123456	\$20.00	

## CARD ACCOUNTS: Inactive Account Deletion

With this release, inactive accounts and all associated data will be permanently deleted from PaymentNet seven (7) months after the account has been purged by JMPC. An account is considered inactive when it has had no transactions for 18 months, has no outstanding balance,

and is past its expiration date. A message showing the scheduled purge date will be displayed for 30 days before the account is deleted. Only cardholders will see this message upon logging into PaymentNet or Commercial Card Mobile if their account has been purged but not yet deleted.

A new Purged status will be used to indicate an account that is scheduled to be deleted from PaymentNet.

A new Purge Date column will be added to the Cardholder Profile report to indicate the date when an account was purged at the processor.

If you have any questions, please contact one of the members of the PCard Team at 302-672-5000.

**PCard Notifications are posted to the Division of Accounting Website:**

**<http://accounting.delaware.gov/pcard.shtml> and select "PCard Communications"**